

Closing Out Cases and Transferring OOB Contacts

COVID-19 Community Team Outreach

When it is time to conclude your monitoring efforts and close a case, the CCTO Tool can support you:

When to End Monitoring: Responsive Contacts

As a reminder, the following can be reviewed when you are concluding monitoring under normal circumstances for a responsive contact. **If your contact has already opted out, proceed to the next page.**

1. Visit your contact's profile and confirm that two weeks (14 days) have elapsed since their last date of exposure to a source patient (or, for a case patient, 10 days since symptom onset AND 3 days with no fever AND improved symptoms). **Be sure you are calculating from "Last Date of Exposure" and not "Begin Monitoring Date."**
2. Visit the Assessments tab and filter "Source Contact" on your contact's full name to review all responses in aggregate and confirm no new symptoms or resource needs that need to be addressed.
3. Return to your contact's profile and confirm that all appointments and field visit tasks are closed and that phone calls have been closed and toggled to made or received.

1 Confirm 14 Days Elapsed

2 Review Assessments

3 Close Activities

When to End Monitoring Non-Responsive Contacts

On the Timeline/Activities section of a contact's profile, review that two days of phone calls at varied times and a field visit have been attempted unsuccessfully.

1 Review Timeline/Activities

Basic Info

First Name	* George
Last Name	* Washington
NC EDSS Event ID of Source Patient #1	101234765
Last Date of Exposure to Source Patient #1	6/2/2020
NC EDSS Event ID of Source Patient #2	---
Last Date of Exposure to Source Patient #2	---

Active Assessments

Source Contact	Date	Created On	Local Health	Assessment	Agreement	Ok for LHD to follow up
George Washington	---	6/11/2020 5:31 PM	Dare	Initial	---	No
George Washington	---	6/12/2020 12:05 PM	Dare	Monitoring	---	No
George Washington	---	6/13/2020 12:05 PM	Dare	Monitoring	---	No
George Washington	---	6/14/2020 12:05 PM	Dare	Monitoring	---	No
George Washington	---	6/15/2020 12:05 PM	Dare	Monitoring	---	No
George Washington	---	6/16/2020 12:05 PM	Dare	Monitoring	---	No

Timeline / Activities

Timeline

Search timeline

Enter a note...

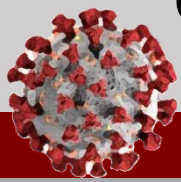
- Recurring Appointment from Mary Moran
6/11-6/16 Monitoring Needed
Closed
- Appointment from Mary Moran
6/11-6/16 Monitoring Needed
Closed
- Appointment from Mary Moran
6/11-6/16 Monitoring Needed

Timeline

Search timeline

Enter a note...

- Note modified by Mary Moran
6/16 Contact Non-Responsive
Two days of calls made with no response. No response
- Task completed by Mary Moran
6/16 Field Visit Attempt
Closed
- Phone Call from Mary Moran
6/15 Initial Outreach
Contact did not respond.
Closed
- Phone Call from Mary Moran
6/15 Initial Outreach
Contact did not respond.
Closed
- Phone Call from Mary Moran
6/15 Initial Outreach
Contact did not respond.
Closed
- Phone Call from Mary Moran
6/14 Initial Outreach
Contact did not respond.
Closed



Closing Out Cases and Transferring OOJ Contacts

COVID-19 Community Team Outreach

When it is time to conclude your monitoring efforts and close a case, the CCTO Tool can support you:

Ending Monitoring & Closing a Case

Once you have completed the above review, you can fill the monitoring fields appropriately.

Note: If you are handling out-of-jurisdiction contacts, please see the next process.

1. Review the "Details" section on your contact's profile.
2. Toggle "Begin Monitoring?" to "No."
3. Under "Monitoring Status," choose the appropriate option to close monitoring and **end digital outreach**:
 - a. "Monitoring Ended" for all normal circumstances.
 - b. "Opted Out" for contacts who have explicitly declined to participate.
4. Under "Final Monitoring Outcome," choose the appropriate option to document the outcome:
 - a. "Refused" for contacts who have explicitly declined to participate.
 - b. "Never Reached" for contacts whom you never successfully reached.
 - c. "Partially" Complete for contacts who began but did not complete monitoring.
 - d. "Fully Complete" for contacts whose entire monitoring period was completed.
 - e. "Other" for exceptional circumstances. **Add a note in Timeline/Activities if you select this option.**
 - f. See next section for OOJ.

5. Click "Save" and deactivate the contact by clicking "Deactivate." **No further action is required on your part.**

1

Details

Begin Monitoring?	No	2
Monitoring Status	Monitoring Ended	3
Monitoring Age	--Select--	
Begin Monitoring Date	Monitoring	
Last Assessment Date	Monitoring Ended	
Final Monitoring Outcome	Opted Out	
Referred to Test?	Yes	
Referred to Test Date	6/15/2020	
Tested?	Yes	

4

Final Monitoring Outcome

--Select--

--Select--

Refused

Never Reached

Partially Complete

Fully Complete

Other

State OOJ, notification completed

5

Save Save & Close + New Deactivate

GW George Washington Contact · MDA Form

Confirm Deactivation

Do you want to deactivate the selected 1 Contact? You can reactivate it later, if you wish. This action will set the Contact as inactive. There may be records in the system that continue to reference these inactive records.

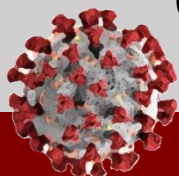
Deactivate Cancel

+ New Activate Connect

Read-only This record's status: Inactive

GW George Washington Contact · MDA Form

- 1 Details
- 2 "Begin Monitoring"
- 3 "Monitoring Status"
- 4 "Final Monitoring Outcome"
- 5 "Save" & "Deactivate"



Closing Out Cases and Transferring OOJ Contacts

COVID-19 Community Team Outreach

When handling an OOJ contact, review the following before attempting to close a case:

Handling Out-of-Jurisdiction Contacts: Other Counties

1. If the OOJ contact is located in another county in North Carolina, **do not close the case or conclude monitoring**. Enter as much information as possible, and then assign the contact to the designated OOJ contact tracer for their county (see "[CCTO OOJ Contact List](#)" in the CDM) by clicking the "Assign" Box from their profile.
2. Single-click "Me" to produce "User or Team" and type the name of your assignee.
3. Click "Assign." The contact will no longer be assigned to you. **No further action is required no your part.**

1 "Assign" Box

2 "Me"/"User or Team"

3 "Assign"

Handling Out-of-Jurisdiction Contacts: Other States

1. If the OOJ contact is located **outside of North Carolina**, enter as much address information as you have for the contact, including the state of residence, in the Address Field Use the process above to **assign the contact to the NC DHHS Movement Monitoring and Notification (MMN) Team Contact (Jennifer Wheeler)**. **No further action is required on your part.**
2. The MMN Team will notify the appropriate parties, close monitoring as described on the previous page, and set "Final Monitoring Outcome" to "State OOJ, notification completed" when finalized. **Only the MMN Team will use the "State OOJ, notification completed" option.**

1 Assign to MMN Team

2 MMN Team Closes

The OOJ User List has been published under "[CCTO OOJ Contact List](#)" in the CD Manual for your reference. This list is updated weekly - ensure you are using the latest.

1

Assign Contact

You have selected 1 Contact. To whom would you like to assign it?

Assign to User or team

User or team 2

Julia Accorsini X

3 Assign Cancel

1

Assign Contact

You have selected 1 Contact. To whom would you like to assign it?

Assign to User or team

User or team Jennifer Wheeler

Assign Cancel

2

Details

Begin Monitoring?	No
Monitoring Status	Monitoring Ended
Monitoring Age	---
Begin Monitoring Date	---
Last Assessment Date	---
Final Monitoring Outcome	State OOJ, notification completed